

Electronic Filing of Campaign Disclosure Reports



STATE BOARD OF ELECTIONS
CAMPAIGN DISCLOSURE DIVISION

WHO IS REQUIRED TO FILE DISCLOSURE REPORTS ELECTRONICALLY?

If a political committee has \$10,000 or more in receipts or expenditures, or has a balance of \$10,000 or more at the end of a reporting period, its disclosure reports must be filed electronically. Once a committee passes the electronic filing threshold it must file all reports electronically, even if it drops back below the threshold. If a committee is required to file electronically, paper filings of reports will no longer be acceptable. The Board encourages all political committees to file electronically, even if they do not reach the mandatory electronic filing threshold. Committees that have not reached the threshold have the option of filing any given report electronically or on paper.

WHAT IS IDIS?

IDIS stands for Illinois Disclosure Information System. It is the electronic filing software provided free of charge by the State Board of Elections for use by political committees filing Illinois campaign disclosure reports.

To prepare a report using IDIS, all you have to do is create your committee file and reporting period, then enter information about receipts and expenditures. IDIS will prepare the report and all necessary schedules. IDIS will compute all totals, determine whether data should be itemized and determine if an employer and occupation must be disclosed. IDIS requires that you enter names and addresses only once. After that, they will be available for all subsequent filings and can easily be changed if needed. You can view a report at any time and see what it would look like if filed at that point. You can also use a validator feature to determine if there are any errors on the report or if information required by law is missing (such as an address, employer and occupation information or a description of an expenditure).

The IDIS software will run on any 32-bit Windows-based platform. It can also run on a MAC if Virtual PC software is installed.

HOW CAN I OBTAIN IDIS SOFTWARE?

It may be downloaded from the Board's website at www.elections.il.gov. It is also available in CD-ROM format. To obtain a copy of the software, contact the Board.

To download from the Internet, simply access the Board's website, click on the IDIS link and then click on the *Download IDIS Electronic Filing Software* link and follow the download instructions by accepting the defaults.

To install the software from CD-ROM or diskettes (2), just insert them into the appropriate drive on your computer and follow the instructions. Accept the default settings provided by the computer. The software will automatically be loaded into the computer's C-drive. Do not save it into a different drive or you may be unable to file electronically.

WHERE DO I GET IDIS HELP?

The Board's campaign disclosure staff is able to provide instruction in using IDIS, as well as some technical support. The program itself has a useful HELP feature that may be accessed from any window. An IDIS training manual is also available in printed form or in downloadable form from the Board website. For some problems it may be necessary to contact NIC Technologies (the developer of the IDIS software), but you should generally contact the Board first. NIC may be reached as follows:

Telephone: (703) 861-4715
E-Mail: techsupport@nicusa.com

IDIS training workshops conducted by campaign disclosure staff are held regularly at the Board offices in Springfield and Chicago, and one-on-one help may be arranged by calling either office. However, we recommend not waiting until the last few days of a filing period to learn how to use the software or file reports – staff availability may be limited at that time.

WHAT IS A FILER IDENTIFICATION NUMBER AND HOW DO I GET ONE?

The Filer Identification Number (FID#) is a number assigned to a political committee by the Board and is required for electronic filing. The FID# is not the same as the 'State' or 'Local' number assigned by the Board. The FID# must be included in the committee information and must be entered, along with a password, when a report is uploaded to the Board via the Internet or a dialup modem. Your Filer Identification Number will never appear on the Internet or on any printed form.

The password and Filer Identification Number serve as an electronic signature. A report may be filed only if the FID# and password match the security information on file with the Board. That is why it is important to keep the Filer Identification Number and password secure.

In order to be issued an FID# a committee must choose a password. The password must be between 5 and 32 characters long and is case-sensitive. The name of at least one contact person, phone number, 9-digit identification number unique to that person and an e-mail address (if possible) are required for security purposes. A second contact person may also be designated. Password and contact person information may be changed if necessary. Filer Identification Numbers can only be assigned from the Springfield Board office. Also, please keep in mind that a Filer ID can only be issued after a committee has filed its Statement of Organization with the Board.

HOW DO I CHANGE A PASSWORD OR CONTACT PERSON?

If you need to change a password or add or change a contact person, call the Board. The information can only be changed if a current contact person contacts the Board and provides his 9-digit personal identification number. This is why two contact people are recommended, even though only one is required. It is also recommended that a new password be selected whenever there is a change in committee officers or contact people.

CAN ALL DISCLOSURE REPORTS BE FILED ELECTRONICALLY?

Most reports can be filed electronically, with two exceptions: A D-1 Statement of Organization may be created with IDIS, but cannot be filed electronically; a Schedule A-1 may be filed electronically, but an amendment of an A-1 may not. If a committee needs to amend a Schedule A-1 it should contact Board staff for assistance.

WHAT ARE THE FILING METHODS?

A committee may file electronically using one of three methods. The preferred method is filing via the Internet. If a committee does not have Internet access but does have a modem, it may file using the dial-up method. The third method (and least preferred) is filing by diskette.

Diskette filing is designed for committees that do not have Internet access or a modem. It involves uploading the report to a diskette, then mailing it to the Board. When submitting the diskette, write the committee name on the label and include a letter stating the committee name, Filer Identification Number and password. Once the report has been successfully received and filed by the Board, the letter will be destroyed.

HOW CAN I BE SURE THE BOARD HAS RECEIVED MY FILING?

Reports may be filed electronically 24 hours a day, 7 days a week. Unlike paper reports, the Board office does not have to be open for reports to be filed via the Internet or by using the dialup method.

When filing electronically, the speed of the process will depend on factors such as the size of the report and the speed of your computer. Ultimately, you will see a message informing you if the upload succeeded or failed. If the last message you see is 'Transmission Successful' or 'Succeeded', your report has been filed. Within a short time you will receive an electronic receipt and your report will be posted on the Internet at the Board's website.

If the last message you see is 'Transmission Unsuccessful' or 'Failed', try to determine from the other messages what the problem might be. If you are unable to determine the meaning of the messages, please contact the Board or NIC Technologies. Normally if problems occur in transmission, it is because of errors in the communication settings on your computer that can be quickly and easily resolved.

If you file via the Internet or by using a dialup modem, you will be able to enter either an e-mail address or fax number during the upload process. When a filing is transmitted successfully, a receipt message will be sent to either or both of these locations within a few minutes. A diskette filing will be receipted by mail.

SHOULD A PAPER COPY BE FILED TOO?

If you file a report with the State Board of Elections electronically, do not also send a paper copy to the state. If your committee is a Local or State/Local committee it may still be necessary to file a paper copy with the county clerk, unless the county in question is enrolled in an optional waiver program with the state. This program exempts committees from filing reports with qualifying county clerks after the reports have been filed electronically with the State Board of Elections. Please check with the Board or county clerk to determine if a given county is enrolled in the waiver program.

HOW CAN I VIEW ELECTRONICALLY FILED REPORTS ON THE INTERNET?

Reports filed electronically may be viewed on the Board website at www.elections.il.gov. Report information may also be printed or downloaded into a database from the website.

CAN IDIS BE USED TO CREATE MAILING LABELS?

Although IDIS is designed to be a record keeping and reporting system and not a campaign management system, it does provide the capability to create mailing labels.

WHAT IS THE VENDOR DEVELOPER PACK FOR IDIS?

Available for download from the Board website, the vendor developer pack includes technical information necessary for the development of programming to file campaign disclosure reports using existing committee software. If you are currently using software developed by an outside vendor, that vendor may need to use the developer pack.

For more information, complete guidelines, and rules and regulations as set forth by the State Board of Elections, write, call, FAX or e-mail the:

Illinois State Board of Elections
1020 South Spring Street
Springfield, IL 62704
(217) 782-4141
(800) 527-VOTE (8683)
(217) 782-5959 (FAX)
(217) 782-1518 (TDD)
webmaster@elections.il.gov

or

Illinois State Board of Elections
James R. Thompson Center
100 West Randolph, Suite 14-100
Chicago, IL 60601
(312) 814-6440
(800) 923-VOTE (8683)
(312) 814-6485 (FAX)
(312) 814-6431 (TDD)

Information including the law, rules and regulations, forms, calendar, and a glossary of terms may be obtained by accessing the State Board of Elections website at www.elections.il.gov.

This brochure is not a complete or fully detailed digest, but an overview intended to help in understanding basic responsibilities under the law. Some of the language in this brochure is presented in simplified form, and should not be considered an exact translation of applicable law or legislation.

For more complete and authoritative guidance concerning all areas of fundraising, refer to actual statutory language and to the State Board of Elections Rules and Regulations. Consultation with professional legal counsel is also encouraged. Additionally, assistance from the State Board of Elections or other governmental authorities, where jurisdiction exists, is encouraged.

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